

1 Jesus Soto (Special Needs Trust)

Case No. 11CEPR00718

Atty Pimentel, Paul J.

Atty Kruthers, Heather H

Status Hearing Re: Second Account

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> 2 ND Account filed 9-5-14 is set for hearing on 10-20-14	
DOD:			
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 9-9-14			
Updates:			
Recommendation:			
File 1 - Soto			

DOD: 8-24-12	CAROLE GOULART , Daughter, was appointed Executor with Full IAEA without bond on 7-8-13. Letters issued on 7-9-13.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account.
	Inventory and Appraisal filed 3-3-14 indicates a total estate value of \$1,850,310.00.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>more time is needed to sell the estate's undivided 1/6 interest in certain property in order to meet the administrative cash requirements of the estate, including tax debt and expenses of approx. \$54,500.00. The Executor will attempt to work out a deal with her uncles, who each own an interest in the property to either borrow against the estate's interest or possibly file a partition action to force a sale. Keeping the estate open over the near-term is not harmful to the estate or the beneficiaries and will allow Peittioner additional time to obtain income tax information to compile delinquent personal income taxes of the decedent and come up with a way to generate sufficient liquidity to enable the settlement and final distribution thereof. Petitioner requests an additional six months.</p>	
		Reviewed by: skc
		Reviewed on: 9-9-14
		Updates:
		Recommendation:
		File 3 - Teixeira

DOD: 02/26/13	<p>SHAWN MURPHY, son, was appointed as Administrator with full IAEA and without bond on 07/11/13.</p> <p>Inventory & Appraisal, Final, filed 02/28/14 - \$254,436.39</p> <p>Inventory & Appraisal, Supplemental, filed 03/25/14- \$2,910.60</p> <p>Status Report filed 09/02/14 states: the Administrator is a firefighter with the CA Dept. of Forestry and has been unable to complete a few remaining task to complete the administration of the estate. Once those remaining tasks are complete, a petition for final distribution will be filed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Account/Report of Administration and Petition for Final Distribution.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 09/09/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 - Murphy</p>